Statewide **I**ntegrated **G**overnmental **M**anagement **A**pplications

Local Entities

Job Aid

Version 2
9/14/2017
SMW

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Introduction

The Local Entities job aid will cover SIGMA registration and processing a solicitation. We will cover how to register through MiLogin and how to create: Solicitations (SO); Requests for Information (RFI); Requests for Quote (RFQ); and Requests for Proposals (RFP) documents.

1. Navigation

In this lesson, users will learn how to access SIGMA Procurement and how to move through the system. This includes how to access SIGMA Procurement and how to create a Solicitation with Document Catalog.

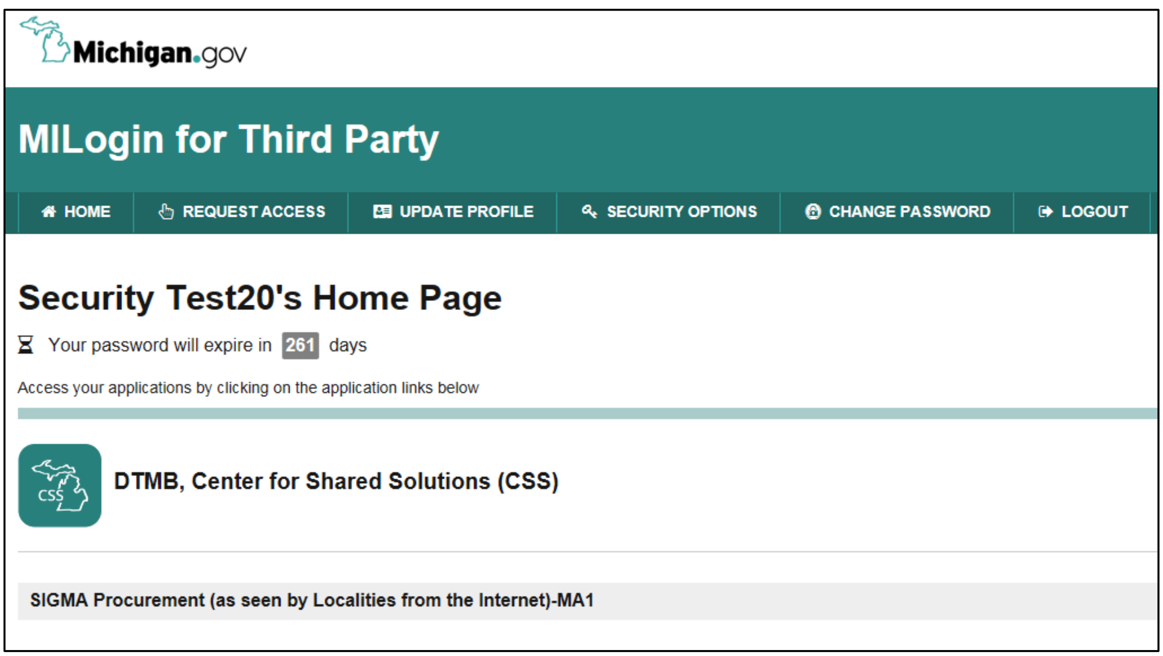
MILogin is the State of Michigan's Single Sign-on application and is used to authenticate users prior to accessing SIGMA Procurement.

To access MILogin via the internet, open a Web browser and enter https://milogintp.michigan.gov in the address field. Users will enter a User Name and Password and once they are authenticated the SIGMA Home page will display.

SIGMA Login

Figure 1 shows the MILogin Home page with a list of applications based on the user's security access.

Figure 1: MILogin – Home Page



SIGMA Procurement Home Page

To access the SIGMA Procurement application, select SIGMA Procurement in the Access your applications list. The SIGMA Procurement home page displays as shown in

Figure 2.

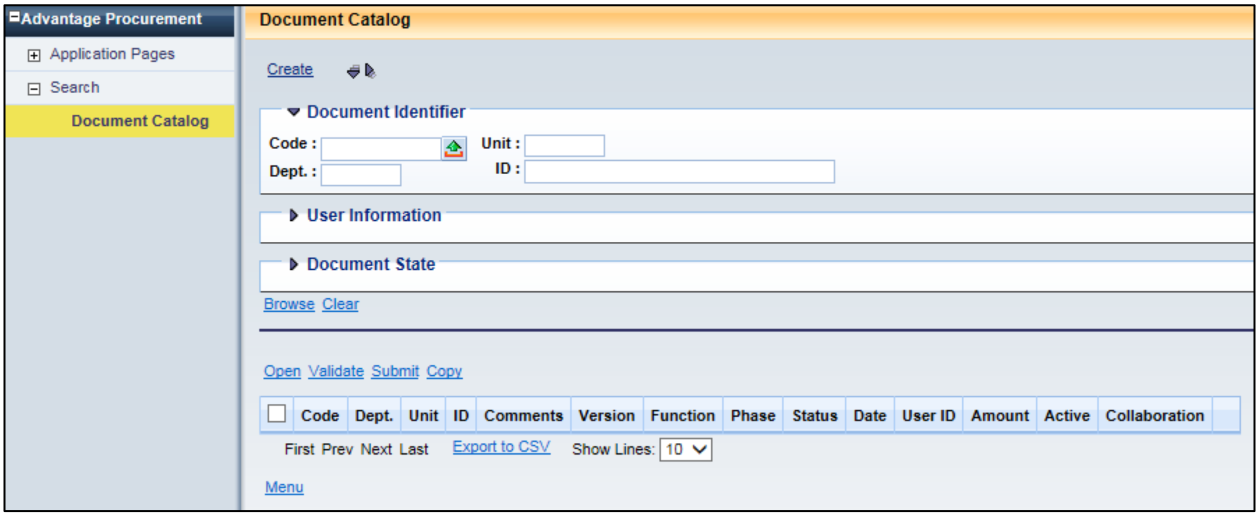
Figure 2: SIGMA Procurement – Home Page

The SIGMA Procurement Home page is divided into three main parts: the Center Panel, the Primary Navigation Panel, and the Secondary Navigation Panel.

- The **Center Panel** is the large center area of the Home page. When opening a document, inquiry or reference table, it displays the fields and data that pertain to the page currently being viewed.
- The **Primary Navigation Panel** is displayed along the top right of the Home page and contains icons and links for Home, Accessibility, App Help, About, and the Logout. It is static and remains the same, regardless of the page currently being viewed.
- The **Secondary Navigation Panel** in Figure 2 above is displayed along the left side of the Home page. Select all of the **expand/collapse** $\boxed{+}$ icons to expand all of the menu options in this panel.

  Select the Document Catalog link from the Secondary Navigation Panel shown in Figure 3.

Figure 3: Secondary Navigation Panel – Document Catalog

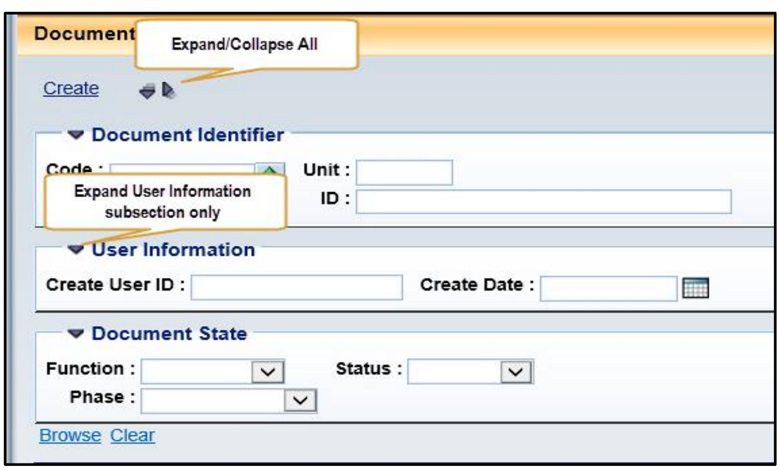


When selecting Document Catalog, subsections and field options appear in the Center Panel that allows users to search for and create new documents. Search criteria in documents can be entered in the Document Catalog from three main sub-sections:

- **Document Identifier** - specific Document Code, Dept, Unit or ID
- **User Information** - Create User ID, or Create Date
- **Document State** - Function, Phase, or Status of the document

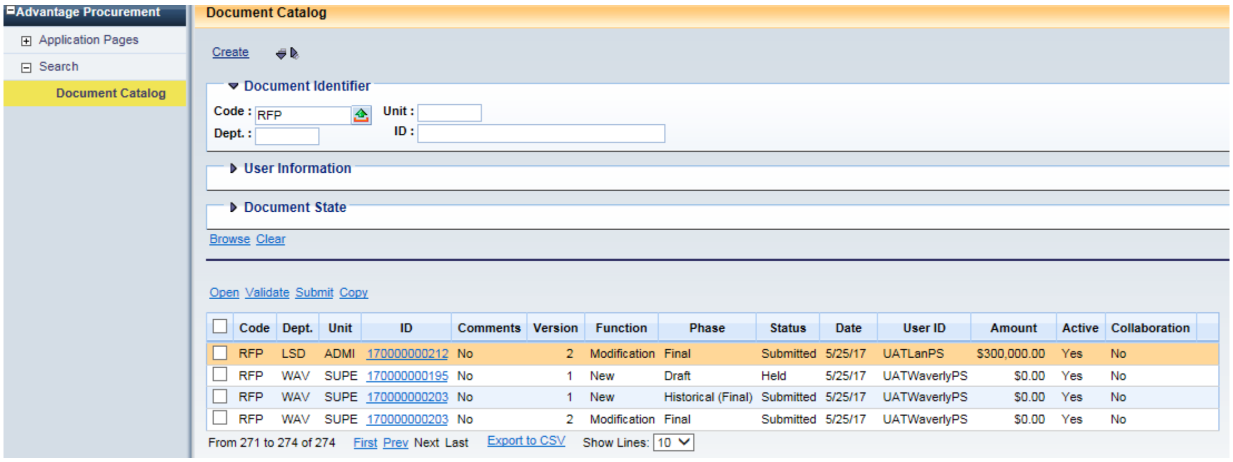
To view the search criteria fields in the subsections that are collapsed (for example User Information), Select the subsection Expand/Collapse icons next to the subsection titles, or Select the Expand All or Collapse All icons pictured in Figure 4.

Figure 4: Document Catalog – Collapse/Expand All Features



After entering search criteria, select Browse as shown in Figure 5 to display the results in the grid at the bottom of the page.

Figure 5: Document Catalog - Browse



Users can create a new document from the Document Catalog by Selecting the Create link at the top of the page. Enter information in the following areas:

- **Document Identifier** - Enter the specific document Code, Dept, Unit, and ID (not required if using Auto Numbering)
- **Other Options** - Select the checkbox for Auto Numbering (if the document allows SIGMA to assign the document ID number) or Create Template (if the document is a template for future documents)

After the document information is entered, select the Create link to open the new document in Draft phase.

2. Creating Solicitations

Request for Quote (RFQ)

VSS is the application where solicitations that are created by Local Entities (RFQ's, RFI's and RFP's as examples) will be posted and where vendors will bid on them. VSS is synchronized with SIGMA Procurement daily on a two hour cycle starting at 8 a.m. and ending at 4 p.m., State business days only.

A Request for Quote (RFQ) document is an informal process used to determine fair and reasonable pricing for the purchase of a good or service. Users can enter additional information on the RFQ such as Schedule of Events, Terms and Conditions, and Publishing information.

Unless the user flags the solicitation not to be imported to SIGMA Vendor Self Service (VSS), once the RFQ document is submitted to Final, it is imported into VSS, once the next VSS Sync Cycle has completed, and an email notification is sent to vendors notifying them of the available opportunity.

The RFQ document has a Header and thirteen detail sections, which are described below.

Note: This manual is intended to highlight the significant fields on each section of the document, not to provide an exhaustive description of every field. The Field Help functionality can be used to view the description of fields not covered explicitly in this manual.

RFQ Document – Header Section

The Header section of the RFQ is used to record general information describing the procurement and to set options and controls related to VSS. The RFQ Header section has seven tabs.

General Information Tab

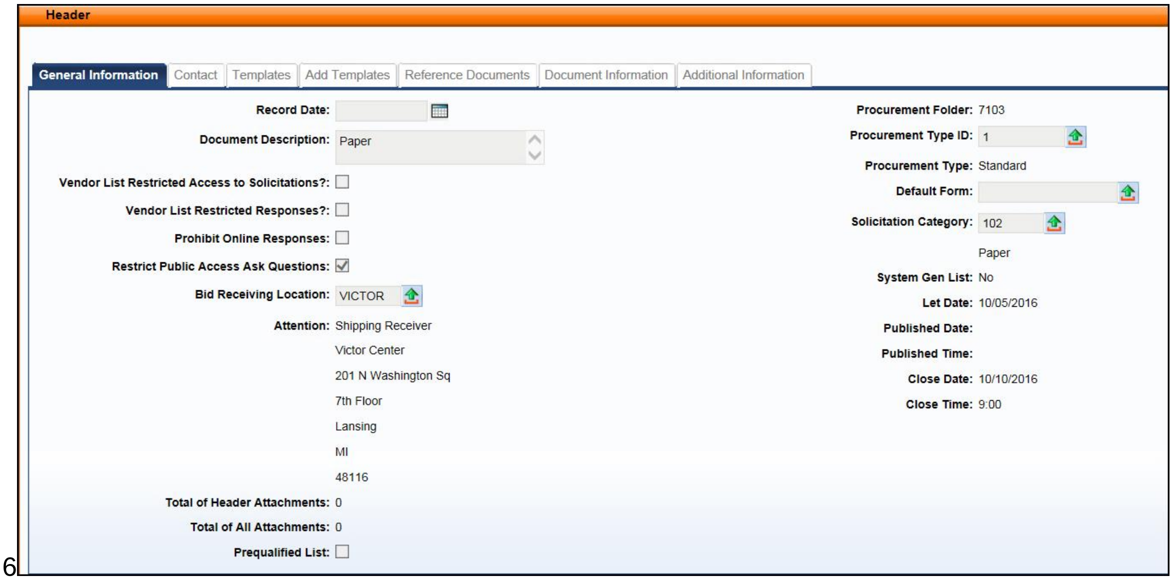
Use the General Information tab to set several options and controls for the solicitation related to VSS as shown in Figure 6:

- **Vendor List Restricted Access to Solicitations? Checkbox** – select this checkbox to indicate only the vendors on the vendor list will receive notification and be able to respond to the Solicitation (SO).
- **Vendor List Restricted Responses? Checkbox** – select this checkbox to indicate only vendors listed in this SO are allowed to respond to this solicitation. Vendors not selected will get a notification and can see the SO but they will not be able bid on it.

Note: If neither Vendor List Restricted Access to Solicitation nor Vendor List Restricted is checked, all vendors registered for the commodities on the SO AND the vendors on the vendor list will receive notification and can bid.

- **Prohibit Online Responses Checkbox** – select this checkbox to indicate online responses to the solicitation via VSS are not allowed for this solicitation.
- **Restrict Public Access Ask Questions Checkbox** – select this check box to indicate questions regarding the solicitation via VSS are restricted to registered VSS users.

Figure 6: RFQ – Header Section – General Information Tab



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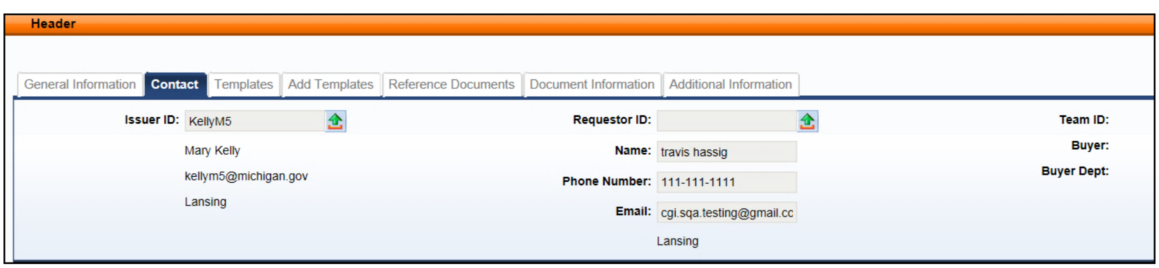
Contact Tab

Enter an Issuer ID and Requester ID for this solicitation as shown in Figure 7.

The Issuer ID defaults based on the User ID of the user who creates the solicitation but this field can be edited.

Note: The Requestor ID and the Issuer ID can be the same. The Requestor ID is also not required and the user can manually enter the Name, Phone Number and Email of the Requestor if needed.

Figure 7: RFQ – Header Section – Contact Tab



RFQ Document - Commodity Section

The Commodity section of RFQ has seven tabs.

General Information Tab

The General Information tab shown in Figure 8 is used to define individual lines included as part of the solicitation. Lines may be defined as items or service using the Line Type dropdown list.

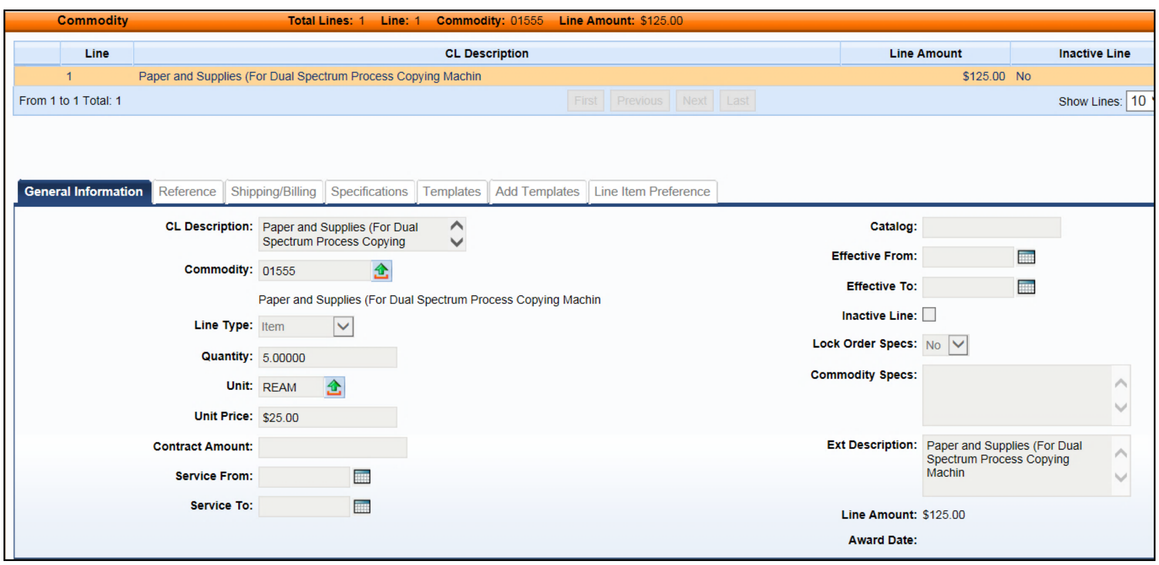
Line Type of Item is used to specify commodity codes that are an item. If the Line Type = item then the following fields can be completed:

- Quantity
- Unit
- Unit Price

Line Type of Service is used to specify commodity codes that are a servicer. If the Line Type = Service then the following fields can be completed:

- Contract Amount
- Service From Date
- Service To Date

Figure 8: RFQ Document – Commodity Section – General Information Tab



Shipping/Billing Tab

The Shipping and Billing Location defaults to the locations associated with the User ID of the person creating the solicitation. Users can also select a Shipping/Billing location if needed.

RFQ Document - Schedule of Events Section

The Schedule of Events section shown in Figure 9 is used to define a schedule of relevant events published on the solicitation document and on VSS.

Figure 9: RFQ Document – Schedule of Events Section

Users can enter events individually using the Event Code pick list and by populating the relevant Sequence, Days and Event Date. Events can also be prepopulated using the Schedule of Events template entered on the Header of the RFQ. Once the events are populated, users will enter the Event Date for the first event and Select the Populate Event Dates button at the bottom of the page. This populates the Event Dates for all subsequent events based on the Sequence and Days fields.

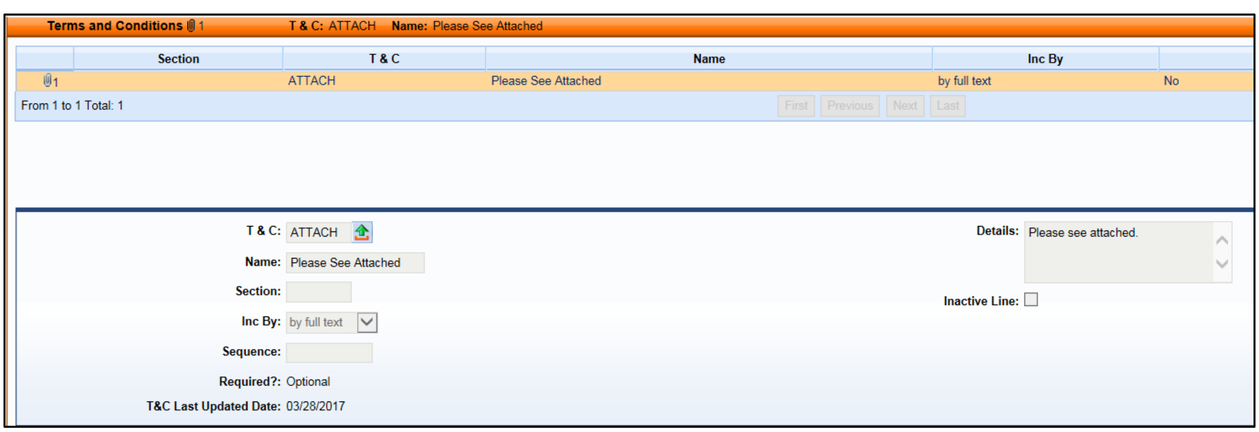
Note: Users can select the CUSTOM Solicitation Event and give it a custom name.

RFQ Document - Terms and Conditions Section

In the Terms and Conditions section shown in Figure 10, users can add individual predefined standard terms and conditions to the RFQ using the pick list for the T & C field. T&C's can also be added as an attachment to the document.

Terms and conditions are posted on VSS as a part of the solicitation.

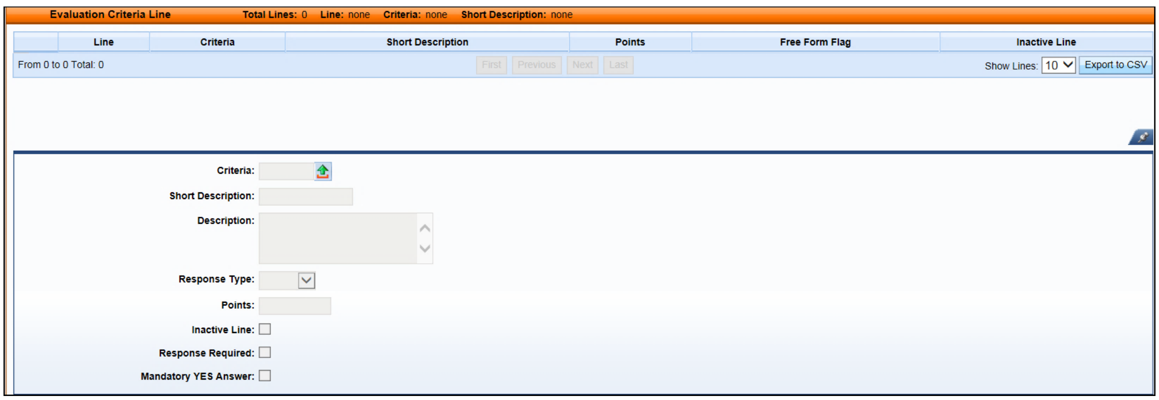
Figure 10: RFQ Document – Terms and Conditions Section



RFQ Document- Evaluation Criteria Line Section

The Evaluation Criteria Line Section shown in Figure 11 is used to define specific criteria for evaluating responses and submittal requirements for the solicitation. This section can also be prepopulated from an Evaluation Criteria Template. If not prepopulated from a template, users can use the pick list to select the Criteria code and enter the Points associated with the criteria. If a response is required to the Evaluation Criteria in order for a vendor to submit a response, select the Response Required check box. If the vendor must answer yes to the criteria in order to be considered for award, select the Mandatory YES Answer check box.

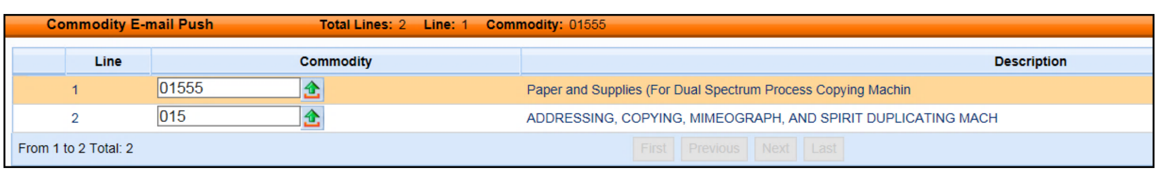
Figure 11: RFQ Document – Evaluation Criteria Line Section



RFQ Document - Commodity Email Push Section

The Commodity Email Push section shown in Figure 12 is used for vendor notification. Records on the Commodity E-mail Push section are prepopulated based on the commodities on the commodity line. Users can add or delete a commodity from the Commodity E-mail Push section. All vendors registered for the commodities listed in this section are selected for notification.

Figure 12: RFQ Document – Commodity Email Push Section



Commodity E-mail Push Total Lines: 2 Line: 1 Commodity: 01555

Line	Commodity	Description
1	01555	Paper and Supplies (For Dual Spectrum Process Copying Machin
2	015	ADDRESSING, COPYING, MIMEOGRAPH, AND SPIRIT DUPLICATING MACH

From 1 to 2 Total: 2 First Previous Next Last

RFQ Document – Publishing Section

The Publishing section shown in Figure 13: contains a series of check boxes, most of which will be defaulted, users can use to indicate which sections of the solicitation are to be displayed on

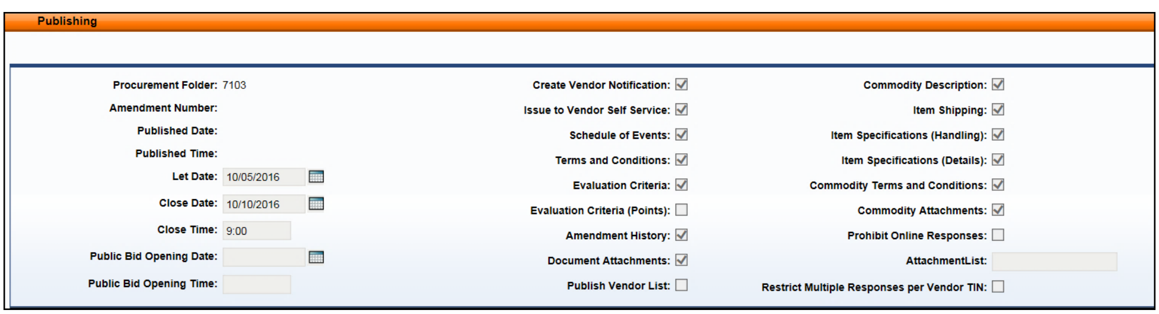
VSS, as well as to set the Bid Closing and Bid Opening dates and times. The Let Date, Close Date, and Close Time must be entered on this section.

Note: The Let Date, Close Date and Close Time fields are formatted in military time. For example: 13:00 hours is 1:00 PM

The following check boxes are used to indicate which sections of the RFQ are to be displayed on VSS:

- **Schedule of Events** – Schedule of Events section on the RFQ
- **Terms and Conditions** – Terms and Conditions section on the RFQ
- **Evaluation Criteria** – Evaluation Criteria Lines listed on the RFQ
- **Evaluation Criteria (Points)** – points associated with the Evaluation Criteria Lines on the RFQ
- **Amendment History** – history of modifications to the solicitation
- **Document Attachments** – any documents attached to the header of the RFQ
- **Commodity Description** – description entered in the Commodity section of the RFQ
- **Item Shipping** – shipping information entered on the Shipping and Billing tab of the Commodity section of the RFQ
- **Item Specifications (Handling)** – handling information entered on the Specifications tab of the Commodity section
- **Item Specifications (Details)** – specifications information entered on the Specifications tab of the Commodity section
- **Commodity Terms and Conditions** – T & C entered on the Commodity T & C section
- **Commodity Attachments** – any documents attached to the commodity line of the RFQ

Figure 13: RFQ Document – Publishing Section



The remaining fields are optional:

- Select the Create Vendor Notification check box to notify all vendors on the defined vendor list of the solicitation. If there is no vendor list defined on the solicitation, all vendors registered for the commodity on the solicitation are notified.

- Select the Issue to Vendor Self Service check box to indicate that the solicitation should be published to VSS.
- Select the Publish Vendor List check box to indicate that the vendor list should be published to VSS.
- Select the Prohibit Online Responses check box to prevent vendors from responding to the solicitation online.

Modification of a RFQ Document

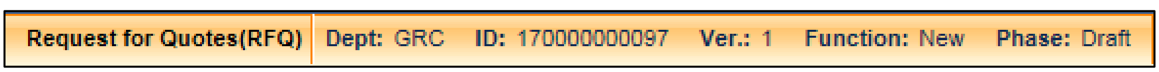
If a solicitation needs to be changed or withdrawn after it has been entered and vendors have been notified, a modification or cancellation can be processed for the original RFQ.

Previously published solicitations may require modification because of changes to the solicitation, such as an extension of the due date.

To make a change to a solicitation, process a modification to the original document. The process for modifying a solicitation is the same regardless of the solicitation document. To amend a solicitation:

1. Locate and open the solicitation to be amended using the Document Catalog or the Procurement Management page.

   Click Edit. Notice that a new version of the solicitation is created in Draft phase.



2. Make any necessary changes to the solicitation.
3. Validate and submit the solicitation.

Once the modification or cancellation is approved and submitted to Final, it is imported into VSS when the next VSS Synch Cycle has completed and an email notification is sent to vendors notifying them of the change or withdrawal of the solicitation. This notification is created by a batch job that is automatically run every two hours starting at 8am and ending at 4pm.

Create a Request for Quotes (RFQ)

The following steps can be followed to create an RFQ.

A. Create an RFQ.

   a. On the Secondary Navigation panel, select **Search.**
   b. Select **Document Catalog.**
   c. Select **Create.**
   d. In the Code field, enter **RFQ.**
   e. In the Dept field, enter **your Dept code.**
   f. In the Unit field, enter **your Unit code.**
   g. Select the **Auto Numbering** check box.

1. Select **Create.** The RFQ document displays. When the RFQ document is created, a new Document ID is generated. Notice that the document is shown as Ver: 1, Function: New, Phase: Draft.

B. Complete the Header section of the RFQ document

h. Select Record Date using calendar
i. In the Document Description field, enter **the item being bid.**
j. Select the Requestor ID picklist
k. In the User ID field, select a User ID using picklist**.**
l. Select **Save.** Requestor Information will populate.

2. Complete the Commodity section of the RFQ document
   a. In the Document Navigator, Select **Commodity.**
   b. Select **Insert New Line.**
   c. In the CL Description field, enter **description of item being bid.**
   d. In the Commodity Field, select a commodity code from the picklist.
   e. Select a value from the Line Type dropdown list.
   f. For Line Type **Item**;
      i. In the Quantity field, enter a value
      ii. In the Unit Field, select a valid value using picklist
      iii. In the Unit Price field, enter a value
   g. For Line Type **Service**;
      i. In the Contract Amount, enter a value
      ii. In the Service From field, select a date using calendar
      iii. In the Service To field, select a date using calendar
   h. Select **Save.**
   i. Select the **Shipping/Billing** tab.
   j. In the Shipping Location field, select a shipping location.
   k. In the Billing Location field, select a billing location**.**

3. Complete the Terms and Conditions section of the RFQ document
   a. In the Document Navigator, Select **Terms and Conditions**
   b. Select **Insert New Line**
   c. In the T&C field, select **ATTACH** from picklist
   d. Click **File** in lower right hand corner
   e. Select Attachments
   f. Click Upload
   g. Click Browse and select terms and conditions document
   h. Check box for file wanting to upload
   i. Click Upload and file will upload successfully
   j. Click Done
   k. Click Return to Document

4. Enter information in the Publishing page.
    a. On the Document Navigator, Select **Publishing**.
    b. Verify that the **Create Vendor Notification** check box is selected. This must be selected in order for the email push to the vendors to function.
    c. In the Let Date field, enter today's date. This controls when the solicitation will be published.
    d. In the Close Date field, Select date 2 weeks from today's date
    e. In the Close Time field enter time **in Military time format.** For example, enter 13:55 for 1:55pm.

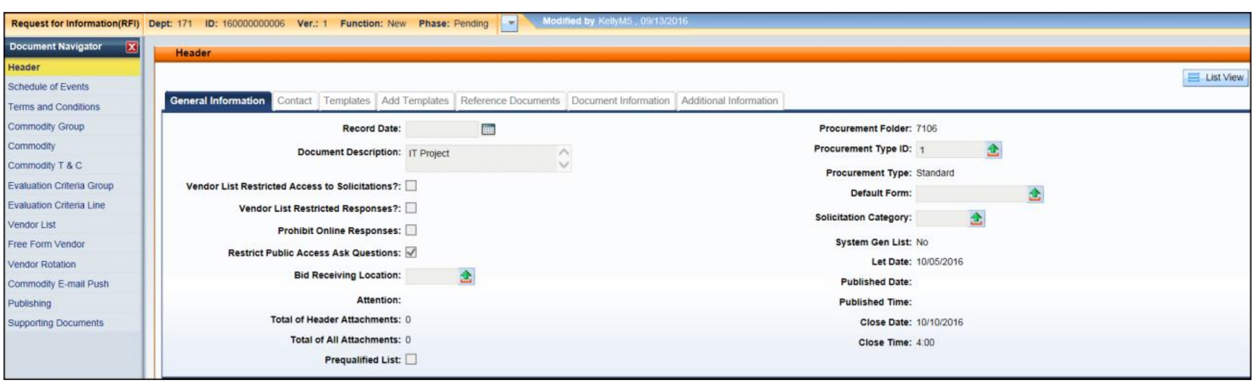
Note: Once the document is submitted and becomes Final, there is a sync job that runs on the even hour starting at 08:00 through 16:00 (8:00 a.m. through 4:00 p.m.), that syncs this information with Vendor Self Service (VSS). If users enter a time such as 13:55 instead of 14:00, this will ensure that the document is included in the upcoming sync cycle at 14:00 or 2:00.

5. Validate and submit the RFQ document.
    a. Select the **Validate** button to check for errors.
    b. Select the **Submit** button to submit the document to Final, after all errors are resolved.

Request for Information (RFI)

The Request for Information (RFI) document shown in Figure 14 is used to collect information about the capabilities of vendors and help make a decision on what steps to take next; however, the detailed requirements to achieve the goal need to be defined. The sections and fields on the RFI are the same as those described above for the RFQ.

Figure 14: Request for Information (RFI) Document



Request for Proposals (RFP)

The Request for Proposal document shown in Figure is a formal competitive bidding process. The Request for Proposal can be designed in a manner that provides the vendor with the specific goods or services needed, and a request is made for pricing, or designed in a manner that identifies critical business and technical requirements. A responding vendor must provide their qualifications, an approach, details about the solution, and pricing information. The sections and fields on the RFP are the same as those described above for the RFQ.

Figure 15: Request for Proposals (RFP) Document